



USEPA

NWRI

Advancing Asset Management in Your Utility: A “Hands-On” Workshop (Managing Your Facility for Long-Term Sustainability)



September 25-26, 2007

Training Location:
Holiday Inn Orange County
2726 South Grand Ave.
Santa Ana, CA 92705

Sponsored by:
United States Environmental Protection Agency
National Water Research Institute (www.nwri-usa.org)

Registration Deadline: September 18, 2007 Register Early – Space is Limited

The Challenge: Over the past half century, America has spent trillions of dollars building some of the finest infrastructure that history has ever seen. This investment has played a substantial role in the sustained prosperity and quality of life of our country. But in many communities, this infrastructure is severely stressed from overuse, under-funding of maintenance and renewal, and aging.

A comprehensive approach to managing our capital assets is overdue – one that brings “state of the practice” advanced asset management (AAM) concepts, tools, techniques, and technologies to bear on managing for cost-effective performance. This approach, first and foremost, is one that focuses relentlessly on providing **sustained performance of value to the customer at the lowest life-cycle cost and at an acceptable level of risk to the organization.**

The Focus: Public sector managers have been managing assets for decades. However, it is clear that what we have been doing in the past will not be sufficient to address the growing and increasingly complex challenges that lie ahead. Practical, advanced techniques for better managing assets have been developed and refined in both the private sector in the US and in water and wastewater agencies around the world. Management thinking is centered on long-term effectiveness, service sustainability, and effective environmental management. *How can these advanced asset management concepts, tools and techniques be most effectively transferred into the water and wastewater industry, more specifically, into your agency? Where to start? How to proceed? How to select appropriate tools?*

The Workshops: The AAM challenge for US agency officials is one of “knowledge transfer.” **For this reason, these workshops have been designed as an extensive hands-on experience.** Each workshop:

- ◆ **Incorporates a real-world storyline** – Demonstrates advanced asset management as a way to approach difficult asset problems.
- ◆ **Participant exercises** – Experience the concepts, techniques and tools of advanced asset management.
- ◆ **Asset Management Experts provide case-based mentoring.** The agenda is built around five core questions.
- ◆ **Demonstrating, step-by-step, how an agency would select and deploy “Best Appropriate AAM Practices”.**

Agenda Highlights

Day ONE (8:00 am – 4:30 pm)

Registration & Continental Breakfast – 7:30 – 8:00 am

Introductions, Storyline, Background and Context

- Introduction of Storyline
- The Changing Utility Industry
- The Emerging Utility of Tomorrow

Overview of Fundamental Concepts and Core Practices

- A Definition of AAM
- The AAM Paradigm
- The Nine Building Blocks of AAM
- Managing the Asset Base's "Potential to Fail"
- Payoffs and Benefits, Downsides

Storyline and Worksheets – Tom's Very Bad Day

Core Questions 1: What is the Current State of My Assets?

- The Role of Expert Judgment – The "Delphi Group"
- Building a "Process Layout" Schematic
- Creating the "Asset Hierarchy"
- Defining the "Data Standard"
- Initial Condition Analysis, Remaining Physical Life
- Valuation/Asset Consumption/Financial Disclosure from a GASB Perspective

Core Question 2: What is My Required "Sustainable" Level of Service (LOS)?

- What Is "LOS?" Why Do It?
- How It Works (Strategic Level versus Operations Level)
- A "Balanced Scorecard" Approach

Core Question 3: Which Assets Are Critical to Sustained Performance?

- Understanding How My Assets Can Fail
- What the Likelihood of Failure Is
- What the Consequences Are
- How to Measure Our Agency's "Business Risk Exposure"

Core Question 4: What Are My Best Minimum Life-Cycle-Cost CIP and O&M Strategies?

- What Alternative "Treatment" (Management) Options Are Feasible?
- Which Is the Best Strategy – "Optimal Renewal Decision Making?"

Discussion, Q & A and Feedback

Day TWO (8:00 am – 3:45 pm)

Summary of Day 1, Outline of Day 2

Core Question 4: O&M (Continued)

- Using AAM to Drive Operations and Maintenance
- Moving Systematically into Reliability Centered and Condition-Based Maintenance

Core Question 4: CIP (Continued)

- Using AAM to Drive the CIP
- Strategic CIP Validation
- Building Your First Asset Management Plan (AMP) for the System
- Balancing CIP and O&M Requirements
- The Strategic CIP Business Plan

Core Question 5: What Is My Best Long-Term

Funding Strategy?

- So, Valuation Really Does Matter?
- Determining a Sustainable Renewal Funding Level
- Effectively Telling the Funding Story
- The "Whole of Business" Perspective – Using AAM for Rate Setting & Budgeting

Focus Topic 1: Deploying an AAM Program

- The Three Fundamental Deployment Strategies
- "Gap Analysis" Benchmarking & Developing the AAM Improvement Program
- The Human Side
- The Political Side
- Implementation Work Plans – Lessons Learned

Focus Topic 2: Meeting the IT Challenge – Toward an Enterprise Asset Management System (EAMS)

- Defining "Work Processes"
- Defining "System Functionality"
- Defining Data Needs and Data Flows
- Developing an EAMS Work Plan

Closing Summary, Questions, Comments, Evaluation, Discussion of Basic Audit

At the conclusion of the workshop, USEPA will provide a **Certificate of Participation**.
This certificate, along with a time-based agenda provides documentation for those attendees seeking CEUs.

About Our Trainers

Mr. Steve Allbee – USEPA Project Director, Gap Analysis; primary author, USEPA's The Clean Water and Drinking Water Infrastructure Gap Analysis; 28 years EPA – development of environmental and financing programs; BA, MA, MPA.

Mr. Duncan Rose – Vice President & Technical Director – Asset Management Group, GHD Inc.; former city/county manager; co-author of WEF's textbook, Managing the Water and Wastewater Utility; 30 years state & local government management; Adjunct Faculty, Florida State University, Askew School of Public Policy; BA, MSP, MAPA.

Mr. Doug Stewart, P.E. – Principal Consultant, GHD Inc.; former Asset Management Program Director, Orange County Sanitation District; 25 years engineering experience, 10 years utility management; BS, MSCE.

Overnight Hotel Accommodations

A limited number of rooms are reserved at the Holiday Inn Orange County, reservations (714) 481-6300. Mention "NWRI" for the discounted room rate of \$99.00 plus tax. The hotel reservation deadline is September 10, 2007. After this date, reservations will be accepted on an Availability Only Basis.

More information about the workshop and asset management is available at www.epa.gov/owm/assetmanage/assets_training.htm and www.nwri-usa.org/AssetManagement.

Questions? Contact Tammy Russo, Workshop Coordinator, at trusso@nwri-usa.org or (714) 378-3278.

Registration: Early registration is \$275 for public agencies, NWRI member agencies, and NWRI Corporate Associates and \$325 for all others. (For regular registration – beginning after September 18, 2007 – add \$50). Complete the attached registration or register online at www.nwri-usa.org/AssetManagement. Registration includes: workshop, continental breakfast, break refreshments, lunch daily and Tuesday reception. Seating is limited.

Cancellations: Accepted until September 18, 2007. Later cancellation subject to \$50 cancellation fee. Send cancellation requests to NWRI.

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Registration Form

*** Register online at www.NWRI-USA.org/AssetManagement***

Name: _____
Organization: _____
Mailing Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ Email: _____

Registration Fee: (please check one)

	Early Registration (on or before 9/18/07)	Regular Registration (after 9/18/07)
Public Agencies, NWRI Member Agencies, and Corporate Associates	<input type="checkbox"/> \$275.00	<input type="checkbox"/> \$325.00
Others	<input type="checkbox"/> \$325.00	<input type="checkbox"/> \$375.00

Payment Information:

_____ Check enclosed
_____ Send an invoice
_____ Credit card (Visa/MasterCard only)

Credit Card No: _____ Expiration Date: _____
Card Holder Name: _____
Card Holder Billing Address: _____

Send registration form and payment to : National Water Research Institute
10500 Ellis Avenue
Fountain Valley, CA 92708
Fax: 714-378-3375

For more information visit NWRI's website at www.NWRI-USA.org.

For registration questions please contact Tammy Russo, Workshop Coordinator at 714-378-3278 or TRusso@NWRI-USA.org.